STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
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31. MAREC 2005
31 MARCH 2005

št./No 96

20 TRGOVINA IN DRUGE STORITVENE DEJAVNOSTI
DISTRIBUTIVE TRADE AND OTHER SERVICE ACTIVITIES

št./No 16

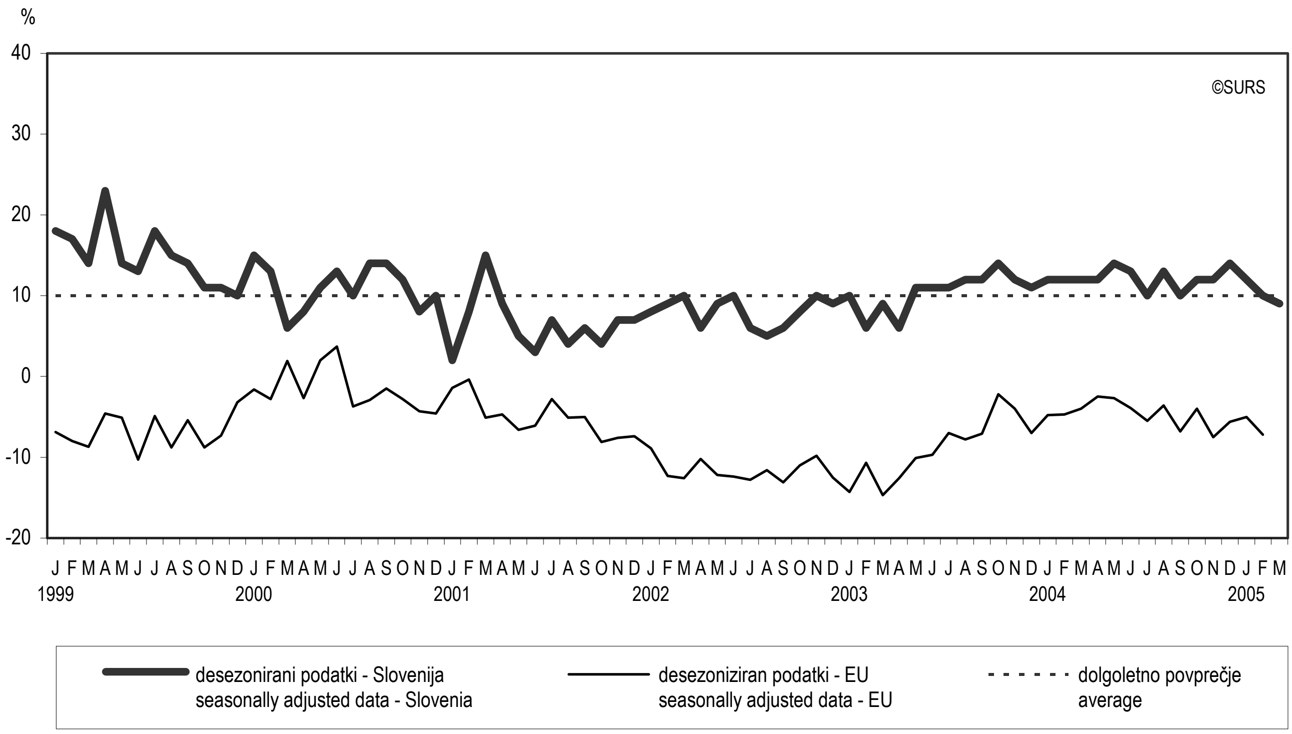
POSLOVNE TENDENCE V TRGOVINI NA DROBNO, SLOVENIJA, MAREC 2005

BUSINESS TENDENCY IN RETAIL TRADE, SLOVENIA, MARCH 2005

- V marcu 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec nekoliko nižja, in sicer za 1 odstotno točko. Vrednost kazalca je padla tudi v primerjavi z lanskim marcem in v primerjavi z lanskim povprečjem, v obeh primerjavah za 3 odstotne točke.
- Na padec vrednosti kazalca zaupanja je vplivala slabša ocena *sedanjega poslovnega položaja.* Ocena *pričakovanega poslovnega položaja* se je malo dvignila, medtem ko je ostala ocena *obsega zalog* nespremenjena.
- Kazalci stanj so se ali poslabšali ali ostali nespremenjeni (kazalca obseg zalog in prodajne cene). Po drugi strani, se je večina kazalcev pričakovanj izboljšala razen kazalca pričakovana skupna nabava, ki se je poslabšal, in kazalca pričakovano zaposlovanje, ki je ostal enak.

- In March 2005 the seasonally adjusted retail trade confidence indicator showed a slight fall compared to the previous month, i.e. by 1 percentage point. It also went down compared to March 2004 and to last year's average - in both comparisons by 3 percentage points.
- This fall of the confidence indicator was determined by the worsening in the assessment of *the present business situation.* The assessment of *the expected business situation* rose slightly, while the assessment of *the volume of stocks* remained unchanged.
- Situation indicators either worsened or remained unchanged (the indicators of the volume of stocks and the selling prices). On the other hand, expectation indicators mostly improved. Exceptions were indicators of the expected orders, which worsened and the expected employment, which remained the same.

Slika 1: KAZALEC ZAUPANJA[1)] V SLOVENIJI IN EU[2)] JANUAR 1999 - MAREC 2005
Chart 1: CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)] JANUARY 1999 - MARCH 2005



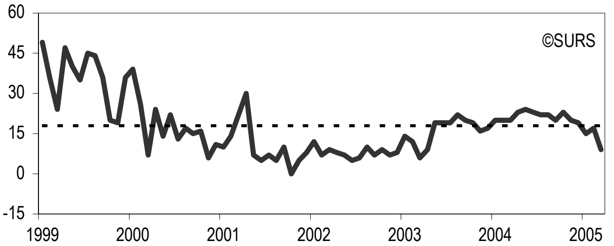
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o sedanjem in pričakovanem poslovnem položaju ter sedanjem obsegu zalog (obrnjen predznak).
The confidence indicator is an average of responses (balances) to questions on present and expected business situation and present volume of stocks (the latter with inverted sign).

2) Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec niso na voljo.
Source for EU data is European Commission. Data for EU for the last month are not available.

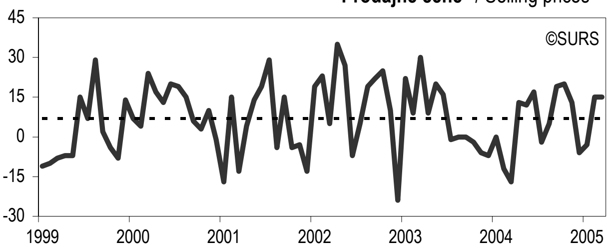
2. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI, JANUAR 1999 - MAREC 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA, JANUARY 1999 - MARCH 2005

Ocena stanj
Appreciation of situation

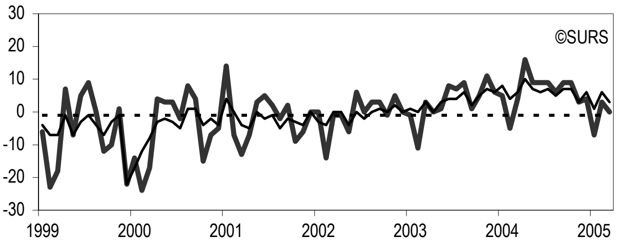
Poslovni položaj[1] / Business situation[1]



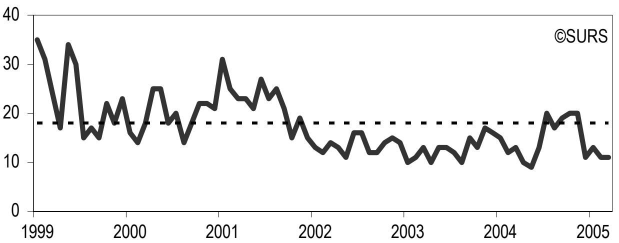
Prodajne cene[1] / Selling prices[1]



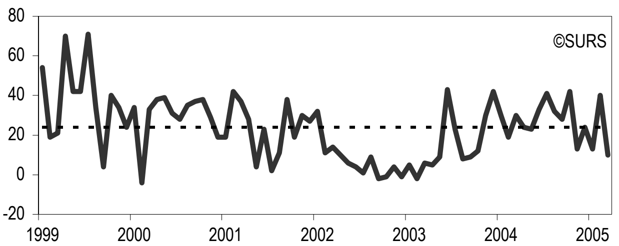
Finančni položaj / Financial situation



Obseg zalog[1] / Volume of stocks[1]

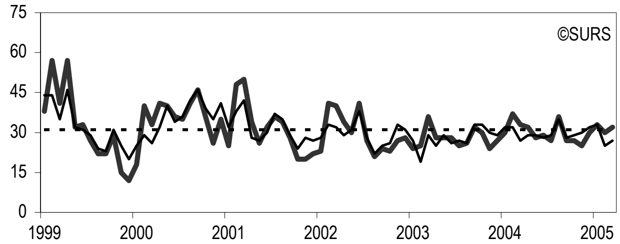


Raven prodaje[1] / Level of sales[1]

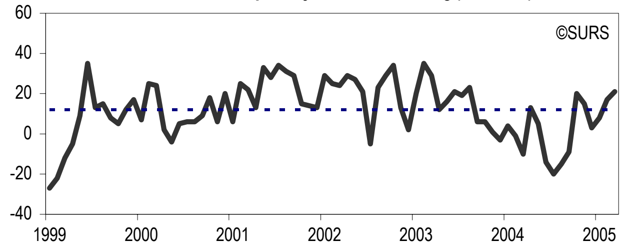


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

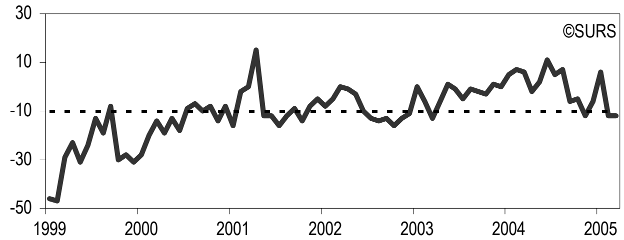
Pričakovani poslovni položaj / Exected business situation



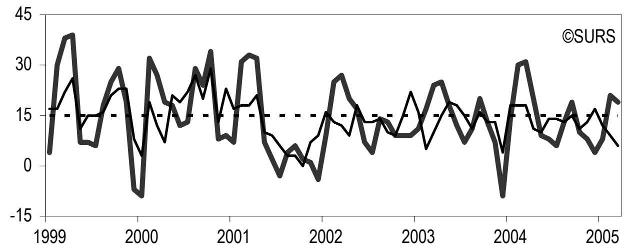
Pričakovane prodajne cene[1] / Selling prices expectations[1]



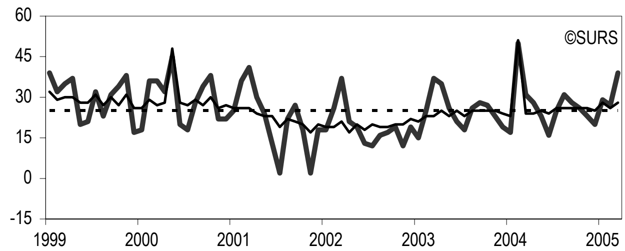
Pričakovano zaposlovanje[1] / Expected employment[1]



Pričakovana skupna nabava / Expected orders placed



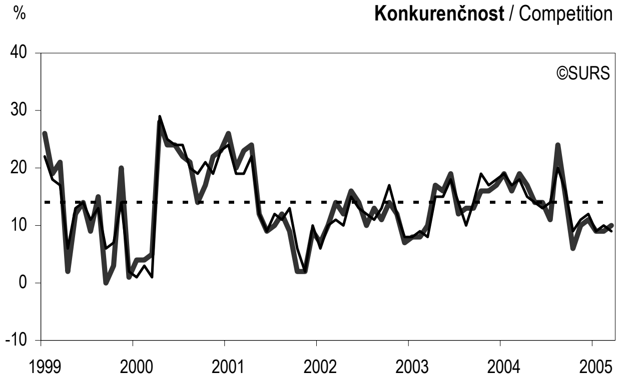
Pričakovano povpraševanje / Expected demand

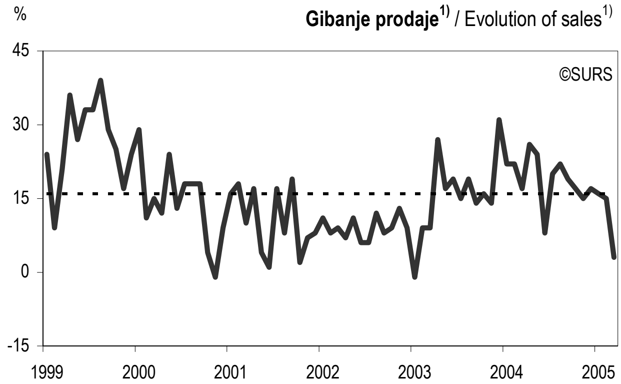


originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje average

1) Sezonska komponenta ni prisotna. / No seasonal component.

Ocena konkurenčnosti in gibanje prodaje / Appreciation of competition and evolution of sales

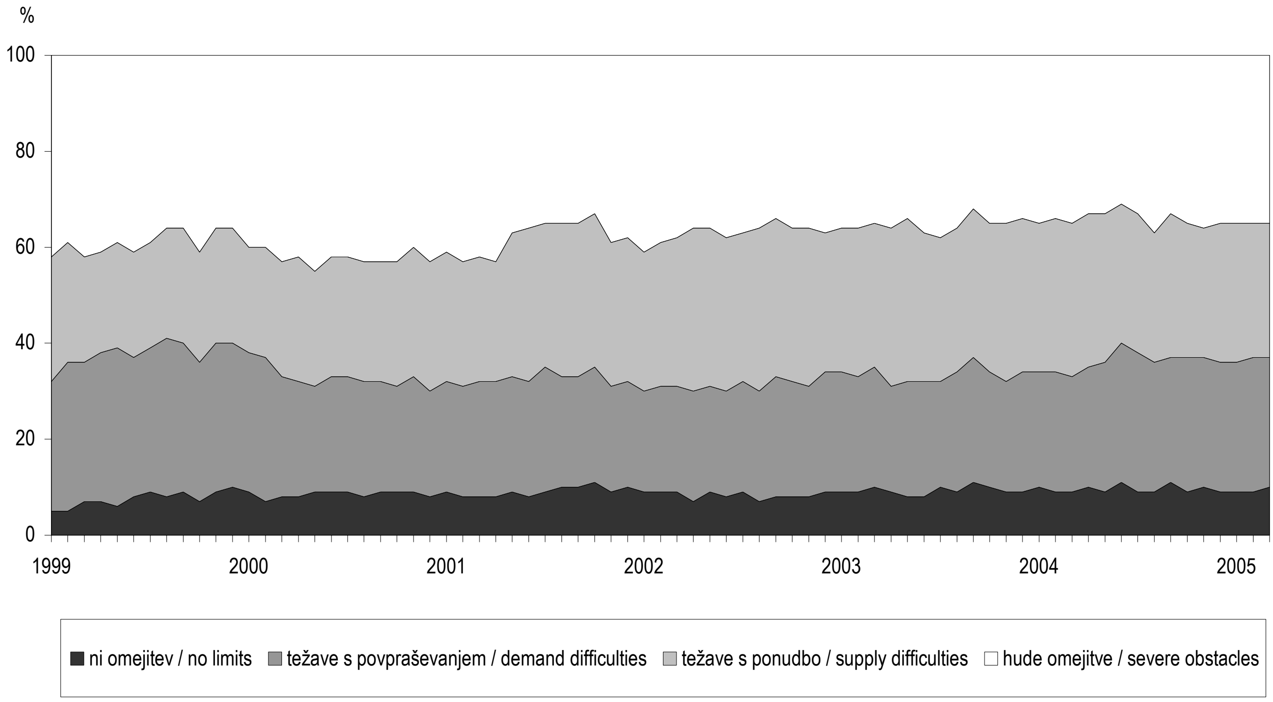




originalni podatki raw data	desezonirani podatki seasonally adjusted data	dolgoletno povprečje average

1) Sezonska komponenta ni prisotna. / No seasonal component.

Omejitveni dejavniki v trgovini na drobno / Obstacles in retail trade



Grafikon o omejitvah v trgovini na drobno prikazuje deleže podjetij, ki se soočajo z naslednjimi skupinami omejitev:

- Skupina **"ni omejitev"** zajema podjetja, ki nimajo težav pri prodaji.
- Skupina **"težave s povpraševanjem"** zajema podjetja, ki imajo težave z nizkim povpraševanjem in konkurenco v sektorju.
- Skupina **"težave s ponudbo**" zajema podjetja, ki imajo težave s slabo ponudbo, visokimi stroški dela, visoko ceno denarja, težavami z dostopnostjo do bančnih posojil, premajhno prodajno površino in premajhnimi skladiščnimi prostori.
- Skupina **"hude omejitve"** zajema podjetja, ki imajo hkrati težave z dejavniki iz skupine "težave s povpraševanjem" kot tudi z dejavniki iz skupine "težave s ponudbo".

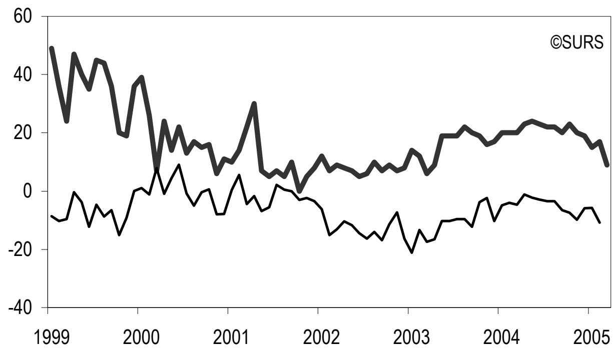
The chart on retail trade obstacles shows the share of enterprises faced with the following groups of problems:

- Group **"no limits"** includes enterprises with no limits to retail.
- Group **"demand difficulties"** includes enterprises faced with low demand and competition in own sector.
- Group **"supply difficulties**" includes enterprises faced with bad supply, high cost of labour, high cost of finance, problems with access to bank credits, small sales surface and small storage capacity.
- Group **"severe obstacles"** includes enterprises faced with problems from the group "demand difficulties" and those from the group "supply difficulties" at the same time.

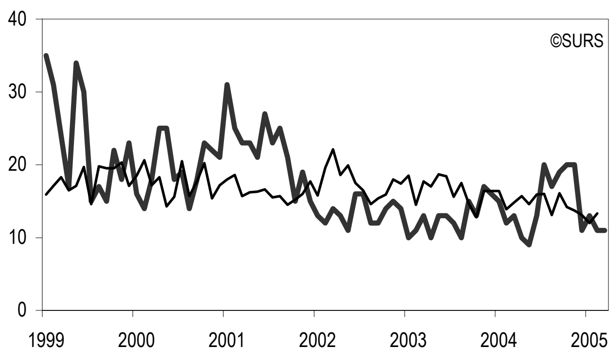
3. GIBANJE EKONOMSKIH KAZALCEV V TRGOVINI NA DROBNO V SLOVENIJI IN EU1), JANUAR 1999 - MAREC 2005
EVOLUTION OF ECONOMIC INDICATORS IN RETAIL TRADE IN SLOVENIA AND EU1), JANUARY 1999 - MARCH 2005

Ocena stanj
Appreciation of situation

% **Poslovni položaj** / Business situation

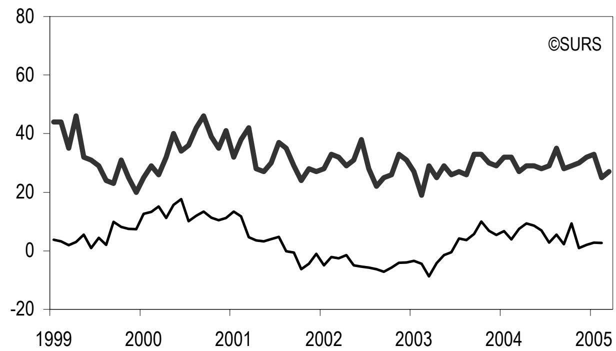


% **Obseg zalog** / Volume of stocks

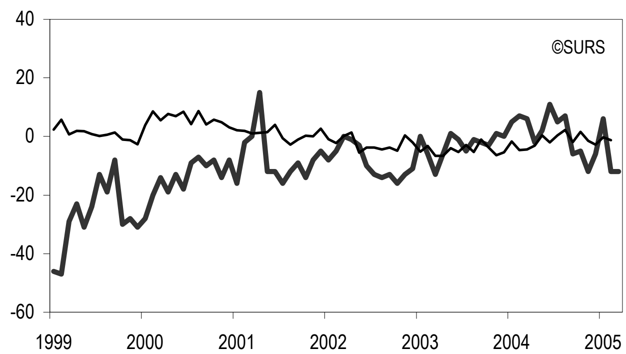


Pričakovanja v naslednjih 3 mesecih
Expectations in the next 3 months

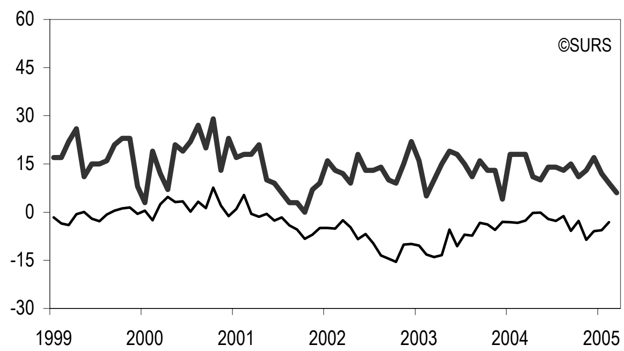
% **Pričakovani poslovni položaj** / Expected busines stuation



% **Pričakovano zaposlovanje** / Expected employment



% **Pričakovana skupna nabava** / Expected orders placed



Slovenija/ Slovenia — EU/EU

1) Vir podatkov je Evropska komisija. Podatki o EU za zadnji mesec niso na voljo. Podatki so desezonirani.
Source for EU data is European Commission. Data for EU for the last month are not available. Data are seasonally adjusted.

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah v trgovini na drobno (vprašalnik PA-TRG) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v trgovini na drobno in kazalca gospodarske klime, ki vključuje poleg kazalca zaupanja v trgovini na drobno tudi kazalec zaupanja pri potrošnikih in kazalec zaupanja v predelovalnih dejavnostih.

Panelno anketo o poslovnih tendencah v trgovini na drobno izvajamo v Sloveniji od januarja 1999 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kakor jo izvajajo v državah članicah Evropske unije že več desetletij, kar omogoča neposredno primerljivost podatkov.

ENOTA OPAZOVANJA

Opazujemo podjetja, ki so po Standardni klasifikaciji dejavnosti razvrščena v trgovino na drobno, in sicer v naslednja oddelka:

- 50 - Prodaja, vzdrževanje in popravila motornih vozil; trgovina na drobno z motornimi gorivi,
- 52 - Trgovina na drobno, razen z motornimi vozili; popravila izdelkov široke porabe.

Vzorec podjetij je oblikovan na podlagi dveh meril:

- razvrstitve trgovskega podjetja po SKD-ju in
- velikosti trgovskega podjetja (prihodek, skladno z zakonom o gospodarskih družbah).

VIRI

Na vprašalnik PA - TRG odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu.

ZAJETJE

V panelni vzorec smo zajeli vsa velika in srednje velika podjetja ter 26 % malih podjetij (ali 37 % prihodka malih podjetij), ki so razvrščena v dejavnost trgovine na drobno ali trgovine z motornimi vozili. Opisani panelni vzorec pokriva 36 % podjetij vzorčnega okvira ali 93 % prihodka v trgovini na drobno in trgovine z motornimi vozili.

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

Odgovori so uteženi tako, da odražajo relativno pomembnost posameznega podjetja v vzorcu. Znotraj razredov SKD so odgovori uteženi s prihodkom.

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo.

DEFINICIJE IN POJASNILA

Ravnotežje je razlika med pozitivnimi in negativnimi odgovori, izraženimi v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih kazalcev (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalcev. Grafikoni prikazujejo ravnotežja po posameznih vprašanjih.

METHODOLOGICAL EXPLANATIONS

PURPOSE OF THE STATISTICAL SURVEY

The purpose of the qualitative Survey on Business Tendency (questionnaire PA-TRG) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The results of the survey are the basis for evaluation of the confidence indicator in retail trade and latter on also for the sentiment indicator, which also includes the consumer confidence indicator and the confidence indicator in manufacturing.

The Panel Survey on Business Tendency in Retail Trade is being carried out in Slovenia since January 1999 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

OBSERVATION UNITS

We are monitoring units that are registered in retail trade or sale of motor vehicles in the following divisions:

- 50 - Sale, maintenance and repair of motor vehicles, retail sale of fuels
- 52 - Retail trade, except of motor vehicles, repair of personal and household goods

They were selected into the panel by two criteria:

- the classification of the enterprise according to the Standard Classification of Activities (SCA) and
- the size of the enterprises (turnover in accordance with the Law on Business Companies).

SOURCES

Persons responding to the monthly PA-TRG questionnaire are managers of enterprises or other executives. They respond between the 1st and the 10th of the month.

COVERAGE

The panel includes all large and medium-sized enterprises and 26% of small enterprises (or 37% of their turnover), the principal activity of which is classified into retail trade and sale of motor vehicles. The panel covers 36% of enterprises of the studied population or 93% of turnover in retail trade and sale of motor vehicles.

METHOD OF DATA COLLECTION

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

Responses to individual questions are weighted so that they reflect relative importance of an individual enterprise in the panel. Inside the SKD classes responses are weighted with the turnover.

NON-RESPONSES

Non-responses are processed every month in accordance with the harmonized methodology.

DEFINITIONS AND EXPLANATIONS

The **balance** is the difference between positive and negative answers, expressed in percent. The balance shows the movement of observed economic indicators (present situation and future expectations), and not the real size of economic indicators. The charts show the balance by individual questions.

Grafi prikazujejo **desezonirane vrednosti.** To so vrednosti, pri katerih je izločen vpliv sezonskih dejavnikov, vsebujejo pa trend - cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na ARIMA modelih.

Pri oblikovanju modelov smo upoštevali obdobje od januarja 1999 do januarja 2005. Pri pričakovanem povpraševanju se model za leto 2005 zaradi narave podatkov razlikuje od modela za leto 2004. Pri sedanjem poslovnem položaju, obsegu zalog, pričakovanem zaposlovanju, prodajnih cenah, pričakovanih prodajnih cenah, ravni prodaje in gibanju prodaje za to obdobje leta sezonska komponenta ni prisotna.

Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o sedanjem in pričakovanem poslovnem položaju in sedanjem obsegu zalog (obrnjen predznak).

OBJAVLJANJE REZULTATOV

Sodelujoči v anketi prejmejo informacijo o dejavnosti, v katero so uvrščeni.

Drugim uporabnikom so ti podatki dostopni na ravni trgovine na drobno in po velikostnih razredih podjetij. Objavljamo jih mesečno v Statističnih informacijah in podatkovni bazi SI-STAT (http://www.stat.si).

VPRAŠANJA:

- Ocene stanj:
  - Ocena poslovnega položaja v zadnjih 3 mesecih: dober, zadovoljiv - normalen glede na sezono, slab?
  - Prodajne cene so v primerjavi s preteklim mesecem: višje, enake, nižje?
  - Ocena finančnega položaja v primerjavi s preteklim mesecem: boljši, enak, slabši?
  - Ocena obsega zalog: premajhne, ustrezne - normalne glede na sezono, prevelike?
  - Ocena prodaje glede na isti mesec lanskega leta: na višji ravni, na isti ravni, na nižji ravni?

- Pričakovanja v naslednjih mesecih:
  - Pričakovani poslovni položaj čez 6 mesecev: boljši, enak, slabši?
  - Pričakovane prodajne cene v naslednjih mesecih: višje, enake, nižje?
  - Pričakovano zaposlovanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?
  - Pričakovani obseg skupne nabave (tuji in domači dobavitelji) v naslednjih 3 meseci: večji, enak, manjši?
  - Pričakovano povpraševanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

  - Ocena konkurence na vašem področju glede na pretekli mesec: večja, enaka, manjša?
  - Ocena gibanja prodaje za to obdobje leta: dobro, zadovoljivo, slabo?
  - Dejavniki, ki ovirajo izboljšanje sedanjega položaja: ni omejitev, nizko povpraševanje, slaba ponudba, visoki stroški dela, visoka cena denarja, težka dostopnost do bančnih posojil, premajhna prodajna površina, premajhni skladiščni prostori, konkurenca v sektorju, ostalo?
  - Pričakovani obseg nabave pri domačih dobaviteljih v naslednjih 3 mesecih: večji, enak, manjši, nimamo domačih dobaviteljev?
  - Pričakovani obseg nabave pri tujih dobaviteljih v naslednjih 3 mesecih: večji, enak, manjši, nimamo tujih dobaviteljev?

Data in the charts are **seasonally adjusted.** Values are adjusted for the seasonal component and include the trend-cycle component and the irregular component. Data for the EU are seasonally adjusted by the DAINTIES method and for Slovenia by the TRAMO/SEATS method, which is based on ARIMA models.

The designing of the models is based on the time period from January 1999 to January 2005. Due to the nature of the data, the 2005 model differs from the 2004 model as regards expected demand. Present business situation, volume of stocks, expected employment, selling prices, selling prices expectations, level of sales and evolution of sales for this period of year have no seasonal component.

The confidence indicator shows an average of responses (balances) to questions on present and expected business situation and present volume of stocks (the latter with inverted sign).

PUBLISHING

Persons participating in the survey get the information on the activity of their enterprises.

Other users can get data for retail trade and data for large, medium-sized and small enterprises published monthly in Rapid Reports and in the SI-STAT database (http://www.stat.si/eng).

QUESTIONS:

- Appreciation of situation:
  - Assessment of the present business situation over the past 3 months: good, satisfactory (normal for the season), bad?
  - Selling prices compared to the last month: up, unchanged, down?
  - Assessment of financial situation compared to the last month: better, same, worse?
  - Assessment of volume of stocks: too small, adequate (normal for the season), too large?
  - Assessment of sales compared to the same month of the previous year: at a higher level, unchanged, at a lower level?

- Expectation in the next months:
  - Expected business situation 6 months ahead: better, same, worse?
  - Selling price expectations for the next months: up, unchanged, down?
  - Employment expectations for the next 3 months: up, unchanged, down?
  - Expectations on orders to place with total suppliers (domestic and foreign) in the next 3 months: up, unchanged, down?
  - Expected demand for the next 3 months: up, unchanged, down?

  - Assessment of competition in own sector compared to the last month: up, unchanged, down?
  - Assessment of sales for this period of year: good, satisfactory, bad?
  - Factors limiting the improvement of the present business situation: none, low demand, bad supply, high labour costs , high costs of finance, problems with access to bank credits, small sales surface, small storage capacity, competition in own sector, other?
  - Expectations on orders to place with domestic suppliers in the next 3 months: up, unchanged, down, no domestic suppliers?
  - Expectations on orders to place with foreign suppliers in the next 3 months: up, unchanged, down, no foreign suppliers?

KOMENTAR

V marcu 2005 je bila desezonirana vrednost kazalca zaupanja v trgovini na drobno glede na pretekli mesec nekoliko nižja, in sicer za 1 odstotno točko. Na padec vrednosti kazalca zaupanja je vplivala predvsem slabša ocena *sedanjega poslovnega položaja*. Vrednost kazalca je padla tudi v primerjavi z lanskim marcem in v primerjavi z lanskim povprečjem, v obeh primerjavah za 3 odstotne točke.

OCENA STANJ

POSLOVNI POLOŽAJ

V marcu 2005 se je kazalec poslovni položaj znižal za 8 odstotnih točk glede na pretekli mesec. Padel je tudi v primerjavi z istim mesecem lanskega leta in v primerjavi z lanskim povprečjem, in sicer za 11 oziroma 12 odstotnih točk.

PRODAJNE CENE

Vrednost kazalca prodajne cene je v mesečni primerjavi ostala nespremenjena. Velik porast vrednosti je bil zabeležen v primerjavi z istim mesecem lanskega leta (za 32 odstotnih točk) in v primerjavi z lanskim povprečjem (za 10 odstotnih točk).

FINANČNI POLOŽAJ

Desezonirana vrednost kazalca finančni položaj je bila v primerjavi s preteklim mesecem nižja za 3 odstotne točke. V primerjavi z marcem 2004 je bila vrednost nižja za 4 odstotne točke in bila 3 odstotne točke pod lanskoletnim povprečjem.

OBSEG ZALOG

Obseg zalog je ostal enak v primerjavi s preteklim mesecem. Vendar pa je vrednost tega kazalca padla glede na pretekli mesec in glede na lansko povprečje, in sicer za 2 odstotni točki oziroma 4 odstotne točke.

RAVEN PRODAJE

Vrednost kazalca raven prodaje se je izrazito znižala v vseh treh primerjavah. V primerjavi s preteklim mesecem je vrednost padla za 30 odstotnih točk, v primerjavi z marcem 2004 za 20 odstotnih točk in v primerjavi z lanskim povprečjem za 18 odstotnih točk.

PRIČAKOVANJA

PRIČAKOVANI POSLOVNI POLOŽAJ

Desezonirana vrednost kazalca pričakovani poslovni položaj se je v primerjavi s preteklim mesecem dvignila za 2 odstotni točki. Vendar je le-ta glede na marec 2004 in glede na lansko povprečje padla, in sicer za 1 odstotno točko oziroma za 3 odstotne točke.

PRIČAKOVANE PRODAJNE CENE

Vrednost kazalca pričakovane prodajne cene se je zelo izboljšala v vseh treh primerjavah. V primerjavi s preteklim mesecem je bila vrednost kazalca višja za 4 odstotne točke, v primerjavi z marcem 2004 za 31 odstotnih točk in v primerjavi z lanskim povprečjem za 22 odstotnih točk.

PRIČAKOVANO ZAPOSLOVANJE

V marcu 2005 je vrednost kazalca pričakovano zaposlovanje ostala enaka kot je bila v februarju 2005. V primerjavi z marcem 2004 je vrednost padla za 18 odstotnih točk in bila 13 odstotnih točk pod lanskim povprečjem.

COMMENT

In March 2005 the seasonally adjusted retail trade confidence indicator showed a slight fall compared to the previous month i.e. by 1 percentage point. This drop was mainly due to the worsening in the assessment of *the present business situation*. The indicator also went down compared to March 2004 and to last year's average - in both comparisons by 3 percentage points.

APPRECIATION OF SITUATION

BUSINESS SITUATION

In March 2005 the business situation indicator deteriorated by 8 percentage points compared to the previous month. It also went down compared to March 2004 and to last year's average, i.e. by 11 and by 12 percentage points, respectively.

SELLING PRICES

In a month-to-month comparison the indicator of the selling prices remained unchanged. A strong increase of the indicator was recorded in comparison with March 2004 (by 32 percentage points) and in comparison with last year's average (by 10 percentage points).

FINANCIAL SITUATION

The seasonally adjusted indicator of the financial situation went down by 3 percentage points compared to the previous month. Compared to March 2004 it fell by 4 percentage points and it was 3 percentage points below last year's average.

VOLUME OF STOCKS

The volume of stocks remained the same as in the previous month. But its indicator fell compared to March 2004 and to last year's average, i.e. by 2 and by 4 percentage points, respectively.

LEVEL OF SALES

The indicator of the level of sales deteriorated significantly in all three comparisons. Compared to the previous month it plummeted by 30 percentage points, compared to March 2004 by 20 percentage points and compared to last year's average by 18 percentage points.

EXPECTATIONS

EXPECTED BUSINESS SITUATION

The seasonally adjusted indicator of the expected business situation rose by 2 percentage points compared to the previous month. However, compared to March 2004 and to last year's average it fell by 1 and 3 percentage points, respectively.

SELLING PRICES EXPECTATIONS

The selling prices expectations indicator improved markedly in all three comparisons. Compared to the previous month the value rose by 4 percentage points, compared to March 2004 by 31 percentage points and compared to last year's average by 22 percentage points.

EXPECTED EMPLOYMENT

In March 2005 the indicator of the expected employment stayed the same as it was in February 2005. In comparison with March 2004 it was down by 18 percentage points and it was 13 percentage points below last year's average.

PRIČAKOVANA SKUPNA NABAVA

Desezonirana vrednost kazalca pričakovana skupna nabava se je poslabšala v vseh primerjavah. V primerjavi s februarjem 2005 se je vrednost znižala za 3 odstotne točke, v primerjavi z marcem 2004 za 12 odstotnih točk in v primerjavi z lanskim povprečjem za 8 odstotnih točk.

PRIČAKOVANO POVPRAŠEVANJE

V marcu 2005 se je v vseh treh primerjavah izboljšala desezonirana vrednost kazalca pričakovano povpraševanje. V primerjavi s preteklim mesecem je bila vrednost višja za 2 odstotni točki, v primerjavi z istim mesecem lani za 8 odstotnih točk in v primerjavi z lanskim povprečjem za 1 odstotno točko.

KONKURENČNOST

Desezonirana vrednost kazalca konkurenčnost je rahlo padla (za 1 odstotno točko) v primerjavi s februarjem 2005. V primerjavi z istim mesecem lani in z lanskim povprečjem je njegova vrednost padla, in sicer za 9 oziroma 6 odstotnih točk.

GIBANJE PRODAJE ZA TO OBDOBJE LETA

Vrednost kazalca gibanje prodaje za to obdobje leta je zelo padla v vseh treh primerjavah. V primerjavi s preteklim mesecem je padla za 12 odstotnih točk, v primerjavi z istim mesecem lanskega leta za 14 odstotnih točk in v primerjavi z lanskim povprečjem za 16 odstotnih točk.

OMEJITVENI DEJAVNIKI V TRGOVINI NA DROBNO

V trgovini na drobno se je 35 % podjetij (oz. 28 % prihodka) srečevalo z dejavniki iz skupine *"hude omejitve"*. Delež teh podjetij se v primerjavi s preteklim mesecem in tudi v primerjavi z istim mesecem lanskega leta ni spremenil.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s ponudbo"*, je bilo 28 % (oz. 26 % prihodka). Delež teh podjetij je bil enak kot v preteklem mesecu, medtem ko je glede na isti mesec lanskega leta padel za 4 odstotne točke.

Podjetij, ki so se srečevala s skupino dejavnikov *"težave s povpraševanjem"*, je bilo 27 % (oz. 29 % prihodka), kar je bilo za 1 odstotno točko manj kot v preteklem mesecu in za 3 odstotne točke več kot v lanskem marcu.

Podjetij, ki *niso imela omejitev* v poslovanju, je bilo 10 % (oz. 17 % prihodka). Delež teh podjetij je bil tako glede na pretekli mesec kot tudi glede na marec 2004 višji za 1 odstotno točko.

Podrobnejši pregled omejitvenih dejavnikov v trgovini na drobno[1)]:

- 47 % podjetij (ali 47 % prihodka) je omejevala konkurenca v sektorju,
- 38 % podjetij (ali 37 % prihodka) so omejevali visoki stroški dela,
- 34 % podjetij (ali 30 % prihodka) je omejevalo nezadostno povpraševanje,
- 25 % podjetij (ali 26 % prihodka) je omejevala visoka cena denarja,

EXPECTED ORDERS

The seasonally adjusted indicator of the expected orders showed an overall worsening. In comparison with February 2005 it declined by 3 percentage points, compared to March 2004 by 12 percentage points and compared to last year's average by 8 percentage points.

EXPECTED DEMAND

In March 2005 an improvement of the seasonally adjusted indicator of the expected demand was recorded in all three comparisons. Compared to February 2005 it went up by 2 percentage points, compared to March 2004 by 8 percentage points and compared to last year's average by 1 percentage point.

COMPETITION

The seasonally adjusted indicator of the competition went down slightly (by 1 percentage point) compared to February 2005. Compared to March 2004 and to last year's average its value fell by 9 and by 6 percentage points, respectively.

EVOLUTION OF SALES FOR THIS PERIOD OF YEAR

The value of the evolution of sales indicator noticeably worsened in all three comparisons: compared to the previous month by 12 percentage points, compared to the same month last year by 14 percentage points and compared to last year's average by 16 percentage points.

OBSTACLES IN RETAIL TRADE

In retail trade 35% of enterprises (28% of turnover) were faced with *"severe obstacles"* in trading. Compared to the previous month as well as to the same month of the last year the share of these enterprises remained unchanged.

The share of enterprises faced with *"supply difficulties"* was 28% (26% of turnover). This share was the same as in the previous month, while compared to March 2004 it fell by 4 percentage points.

The share of enterprises faced with *"demand difficulties"* was 27% (29% of turnover), which was 1 percentage point less than in the previous month and 3 percentage points more than in March 2004.

Only 10% of enterprises (17% of turnover) experienced *no obstacles.* The share of these enterprises rose compared to the previous month as well as compared to March 2004 by 1 percentage point.

A more detailed overview of obstacles in retail trade[1)] shows that:

- 47% of enterprises (or 47% of turnover) were limited by competition in own sector,
- 38% of enterprises (or 37% of turnover) were limited by high cost of labour,
- 34% of enterprises (or 30% of turnover) were limited by insufficient demand,
- 25% of enterprises (or 26% of turnover) were limited by high cost of money,

1) Podjetja lahko označijo več dejavnikov, ki omejujejo njihovo poslovanje, zato vsota odstotkov ni 100.
Enterprises can select several obstacles to their business, so the total is not 100%.

- 13 % podjetij (ali 8 % prihodka) je omejevala premajhna prodajna površina,
- 12 % podjetij (ali 7 % prihodka) je omejevala dostopnost do bančnih posojil,
- 11 % podjetij (ali 17 % prihodka) ni imelo omejitev v poslovanju,
- 10 % podjetij (ali 7 % prihodka) so omejevali drugi dejavniki, kot so finančna nedisciplina, visoke najemnine, slaba lokacija itd.,
- 7 % podjetij (ali 3 % prihodka) so omejevali premajhni skladiščni prostori,
- 2 % podjetij (ali 1 % prihodka) je omejevala slaba ponudba.

- 13% of enterprises (or 8% of turnover) were limited by shortage of sales surface,
- 12% of enterprises (or 7% of turnover) were limited by access to bank credits,
- 11% of enterprises (or 17% of turnover) experienced no obstacles,
- 10% of enterprises (or 7% of turnover) were limited by other factors such as lack of financial discipline, high rents, bad location, etc.,
- 7% of enterprises (or 3% of turnover) were limited by small storage capacity,
- 2% of enterprises (or 1% of turnover) were limited by supply shortage.

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